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ABSTRACT

This document contains two papers from a symposium that was moderated by facilitator Peter A. DeLisel at the 1995 conference of the Academy of Human Resource Development. "The Case for Learning" (Karen E. Watkins, Victoria J. Marsick) argues for a broader, more transformative definition of the field of human resource development (HRD), proposes the concept of a learning organization as a unifying vision for the field, and suggests that embracing the vision of a learning organization will give human resource developers an opportunity to help organizations see the way in which learning is intrinsic and essential to the achievement of organizational strategic goals. "Human Resource Development: Performance Is the Key" (Richard A. Swanson) makes the following arguments: the HRD profession has been either lax or indifferent as to its desired outcomes; if it is to qualify as a major business process and/or a value-added activity, HRD must focus on performance and performance improvement; and without a performance orientation, HRD is destined to the status of an optional activity and/or a waste of resources. (MN)

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ACADEMY OF HUMAN RESOURCE DEVELOPMENT

1995 Conference Proceedings

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St. Louis, MO

[1] HRD TOWN FORUM 7:00-8:00 pm Facilitator: Peter A. DeLisle, University of Illinois

The Case for Learning
Karen E. Watkins, AHRD President, University of Georgia

The Case for Performance
Richard A. Swanson, AHRD President-Elect & Conference Chair, University of Minnesota

Open Forum Among Academy Members
Peter A. DeLisle, Moderator, University of Illinois

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The Case for Learning[1]

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In this paper, we argue for a broader, more transformative definition of the field of human resource development. The concept of a learning organization is proposed as a unifying vision for the field. By embracing this vision, human resource developers have the opportunity to help the organization see the way in which learning is intrinsic and essential to the achievement of organizational strategic goals. Implications for creating a learning organization are discussed.

As we have conceptualized the field of human resource development, we have explored the need for a shift from a reliance on behaviorism to a broader, more transformative conception of learning (Marsick and Watkins, 1990a; Marsick and Watkins, 1990b in Galbraith), the need for a broader definition of the field of human resource development (Watkins, 1989 in Merriam and Cunningham), and differences and demands brought about by learning in the workplace which call for greater inclusion of informal and incidental learning strategies by human resource developers (Marsick and Watkins, 1990a). In this paper we revisit these ideas about the field of human resource development and then turn to a discussion of why we believe that the learning organization is an integrating vision for the field of human resource development. Our view of the learning organization and the consequent implications for the practice of human resource development will be presented.

Broadening the Conception of Human Resource Development

It is clear from all of our work that we aim to open the paradigm of practice in the field of human resource development. This aim is in direct conflict with that of Nadler (1983) who hopes to clarify the field by rigorously defining it and categorizing what it is and what it is not; or the American Society for Training and Development through the McLagan (1989) competency study which defines the field by identifying eleven human resource roles and then limiting human resource development to three of them, which then further delimits the field through lists of competencies and skills of practitioners. Although we agree that such efforts to define a field are healthy and needed in a new field, we also think that these approaches have been informed by a behavioristic view of practice and a reductionistic bias (Watkins and Willis, 1991). Practitioners may specialize in one or more areas of practice, but many if not most human resource developers, do not find that their work falls neatly into one or more of eleven roles. Indeed, more often than not, a senior practitioner may have had job experiences in all eleven. Skills under these conditions must be broad. We believe that what is more important is a practice-based definition which may also provide a vision for the field. A definition which captures

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[1] Excerpted from Watkins, K. and Marsick, V. (1993) "Building the learning organisation: A new role for human resource developers" Studies in Continuing Education, XIV (2) 115-129.

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such a vision for the field of human resource development is found in Watkins (1989, in Merriam and Cunningham):

> Human resource development is the field of study and practice responsible for the fostering of a long term, work-related learning capacity at the individual, group, and organizational levels. As such, it includes--but is not limited to--training, career development, and organizational development (p. 427).

This means that human resource developers are involved in facilitating or monitoring all types of learning in the workplace including formal, informal, and incidental learning. While the learner or client will vary from individuals to groups or departments to the entire organization, the professional mission of embedding an enhanced learning capacity or a learning-how-to-learn capacity will not. From the perspective afforded by this definition, the range of activities that human resource developers might engage in is vast.

This definition leads quite logically to the idea that human resource developers have a role as developers of the organization's learning system. A senior trainer for a multi-million dollar service industry described his role as "internal marketer." He said his role was to "sell" the organization's mission to the employees, to interpret and help to operationalize the chief operating officer's visions and dreams, and to embed the norms and values that characterize his organization's unique culture. He developed a video sharing the organizational saga - the critical turning points in its history, the vision of the founding fathers, and the current heroes who now carry the torch that was lit the day the organization was founded. He worked with top level staff to develop corporate vision and mission statements. And his primary training function was new employee orientation.

In many training departments, new employee orientation is often viewed as a distasteful task which is then relegated to new trainers. This trainer saw that new employee orientation was the pressure point for embedding the organizational culture. Done well, it could produce employees who know from the start what the organization stands for and how they can be a contributor to the mission. It can give them a sense of being part of something larger than themselves that is worthwhile, something worthy of their loyalty. It can also allow them to make an informed choice about whether or not this organization is one to which they want to make a long-term commitment. In this organization, new employee orientation became not just a means to share rules and procedures, but rather a means to enhance the long-term learning capacity of the organization by producing employees who know how to focus their learning and work on organizational needs and, potentially, by reducing turnover so that the wisdom accumulated by these employees stays in the organization allowing the organization to grow as they do. This is the kind of thinking about one's task which we think characterizes effective human resource developers and which is consistent with this definition of the field.

It seems to us that human resource developers have either moved in this direction or become logistics arrangers; scheduling conferences, handling outside consultants who can do these things, or managing resources like film libraries or packaged courses. Why would we expect that training would be immune to the paradigm shift attendant on a society as a whole moving into an information age? Human resource developers may find that they must either become expert at nonprogrammable learning strategies, or they will design or manage preprogrammed, technologically-delivered learning strategies.

In Watkins' definition, it is the outcome of one's efforts as a human resource developer that is stressed rather than the processes used to get there. Many means are possible, and in fact, desirable. This definition asks human resource developers to increase the overall learning capacity of the organization by enabling individuals to be more effective continuous learners, groups to identify and overcome barriers to collective learning, and organizations to create structures and a culture for continuous learning. In this instance, the role of the human resource developer is really more of enacting a vision. This will require continual reshaping and creativity. Results can be measured in terms of the enhanced learning effectiveness of individuals, groups, and organizations. It is precisely because our vision of human resource development is both broad and yet goal-focused that we see the learning organization as a natural evolution of the field. Human resource developers who are systematically and developmentally increasing the learning capacity of the organization *are* creating learning organizations.

From this perspective, theories of organizational change and development, the contributions of developmental stage theory and career development theory add to the knowledge base of the human resource developer. It is when human resource developers attempt to integrate learning strategies, particularly informal and continuous learning strategies, with a larger organizational change objective such as total quality management, that this merger of educational and organizational development roles becomes operational.

One reason this vision of the field is more vision than practice is that human resource development is seldom strategically positioned to influence the organization as a whole. Carnevale, Gainer, and Villet (1990) believe that training should already be at the corporate planning table but note that it seldom is. We agree and believe that a broader conceptualization of the field will enable human resource developers to take action to create this strategic alignment.

Toward the Learning Organization

In the field of human resource development, we have long sought to define who we are in order to clarify what it is that we do that is unique, so our concern with the definition and conception of the field is one we share with many. Ours is an applied field and therefore one that necessarily draws on many disciplines. Gradually, scholars are beginning to claim a niche that is distinctive. We think that the concept of a learning organization is one such niche for human resource developers as it brings together the two primary foci for this field: learning and the workplace context in which it occurs. Figure 1 illustrates the type of knowledge that we think human resource developers should seek in research and practice.

Figure 1 Conceptualizing HRD: The Nexus is the Learning Organization

WORKPLACE LEARNING

- *How do you create a learning culture in an organization?*
- *What is different about learning in the workplace?*
- *What is it about the organization that enhances or thwarts learning?*
- *How is learning enhanced in the workplace?*
- *How do we systemati-, cally develop an organization over time as a learning system?*
- *How do we systematically design learning for maximum personal career, & organizational learning & development?*

The learning organization is an evolutionary stage of thinking about workplace education in the United States. Early efforts to systematize training after World War II focused on simple procedures for developing behavioral skills for several reasons. Work procedures were standardized in an industrial economy, allowing for little deviation from desired routines. The workforce was not highly educated, so people could not easily be asked to use independent judgment or to perform complex operations. Training became skill-oriented and systematic to meet these needs. But the workplace has changed dramatically, while learning approaches have not kept pace. The information age demands judgment, autonomy, and complex thinking from the shop floor to the manager. While there is a large group of functional illiterate workers, the workforce on average is more highly educated and able to perform complex operations. The learning organization provides a home for

new thinking about old educational needs, but it goes beyond that as well because it links individual learning with organizational learning. In many ways, organizational learning is a metaphor for understanding how systems change. Organizations do learn through individuals, but only when that learning is socially constructed, shared, and used to make a difference in larger social units or subdivisions of the organization, or more typically in the entire organization. In fact, learning organizations are characterized by total employee involvement in a process of collaboratively inititated, collaboratively conducted, collectively accountable change directed toward shared values or principles. Individuals work together to learn how to become a new entity.

Continuous learning strategies alone are not sufficient to create a learning organization. If people are learning continuously, the overall skill threshold of the organization improves, and a greater degree of slack is created in the learning system. As a result, the capability of the organization to respond to change and to act more skillfully (with total quality) improves. Yet, the organization as a whole is only doing "as before, but more." The organization must also be able to change itself fundamentally, which it can only do by changing the beliefs or mental models of its members. It is through ideology and structure that the organization is able to see new relationships and to change the framework through which the organization works. Ideology shapes the responses of the organization and structure constrains its responses. By changing the ideology and/or the structure, you transform the organization.

On the other hand, the current rate of change may be so great, that organizations are in a constant state of inconsistency. In this scenario, learning how to absorb impacts, how to stay afloat in a sea of changes, to choose changes to retain, and to become expert at a consistent overall strategy may be equally valuable skills. Learning when to change, when not to; how to stabilize the organization in turbulent times; and how to create a clear direction and aim toward it amidst a typhoon are as important as learning how to become a different organization in order to respond to different times. We conclude that organizations learn when they retain new skills or information, i.e. when they actually change. They increase their *capacity* to learn by making changes in the four systems which influence learning: strategy, structure, slack and ideology. All organizations learn. A learning organization is one which has an enhanced capacity to learn.

At the organizational level, the capacity of the organization to learn is enhanced through workplace literacy initiatives which change the threshold of skill in the organization. System-wide skills assessments and training strategically targeted to skill gaps are strategies which hold promise in enhancing the capacity of the organization to learn. Organizations which have a wide range of options for both recognizing and rewarding achievement, options for linking pay with individual and team needs and performance, as well as for funding learning, motivate continuous learning. Work redesign and experiments with self-directed or self-managed teams also may create the motivation to learn by making work challenging. Empowerment and employee involvement are also essential to change the structures which now prevent learning. Structures which encourage dependency lead to learned helplessness. Under these conditions, people do not try new things. As one person put it in a high technology organization with whom we have worked, "In this organization, there are nine people waiting to lop off the branch when you go out on a limb. That's why no one wants to sign up for this change effort."

At the organizational level, more collaborative structures enhance the organization's ability to learn. Boundary spanning in the form of building networks and collaborative endeavors rather than, as now, building one way communication, enhance learning. Slack is another key to whether an organization either has the capacity to learn or to change. An organization that has neither financial, technological, nor human reserves has no spare resources to learn or to try new things. . . .Lewin (in Argyris, 1952) wrote that learning is goal-directed behavior which requires "space of free movement." Education becomes a process of making space. Whether one is challenging existing prejudices, therefore making room for new beliefs; increasing an individual's ability to think abstractly or conceptually, thereby making space for theories and ideas which are broader, more able to "hold" and order large bodies of concrete, factual information; or teaching new skills, the net effect is that the individual has more room --"space of free movement"-- to act and to think.

At the organizational level, the ability to articulate and pursue a personal vision, functions to trigger learning. In total quality management, a cornerstone is "management by fact." Putting

accurate data in the hands of everyone about current functioning along with a standard or benchmark of what is ideal (e.g. zero defects) creates a goal that can trigger learning. Space of free movement at the organizational level might be accomplished by learning to work collaboratively because it extends the organizations' capacity to achieve unified action on common goals/problems. Learning to think systemically may also ensure greater space of free movement because this allows more individuals in the organization to have an accurate picture of the interdependence of the parts of the organization, the people, and the actions taken. Finally, the approaches with the greatest potential to enhance the space of free movement in the organization are those which empower all members of the organization. Autonomy is having the power to act on one's own initiative. Rigid structures constrain autonomy and collaboration, but so does the tacit belief system of the organization when it is control-oriented and philosophically authoritarian. A more democratic workplace could achieve this balance of collaboration and autonomy.

In short, we think that the challenge and the excitement presented by the idea of the learning organization is that it calls on organizations to make good the promises of the past. Literature abounds calling for more open systems, for democratic workplaces, and for more participative, less authoritarian leadership. Despite numerous attempts to change organizations in these directions, the fundamental dynamic in the organization has changed little. A focus on learning necessarily challenges this. Learning occurs developmentally from the making of mistakes; to awkward hit and miss, trial and error achievement; to high performance. A zero defect culture where mistakes are high risk is highly unlikely to encourage learning. A climate of public humiliation and an atmosphere of criticism and punitive, subjective performance appraisal are also deadly for learning. Learning dies or is squelched in the little incidental moments when a quality team, for example, mentions a project tentatively and a top manager says that "it's already been done." Or, when a team suggests that one way to make managers more interpersonally sensitive is to "reward up" by letting employees nominate their managers for recognition awards, other management members of the team immediately say that this suggestion is outside of the scope of authority of the team. In each of these cases, learning is threatened.

Learning is opportunisitic. Those who develop the sense of when they are in a "teachable moment" and when others have "shut down," make effective teachers. Those who know what the learner needs to know next or what words the learner must hear to comprehend in order to move along the developmental continuum are effective teachers/coaches. What does this look like at the organizational level? Experiments in teaching managers to be facilitators, coaches, interpreters and guides hold promise. Strategies which empower, which enable bottom up movement and communication again make sense here since they create the possibility for everyone to become both teacher and learner. But most especially, what this looks like is a long term process of evolution. Strict, tightly controlled environments do not break free overnight. Figure 2 summarizes these strategies for building a learning organization.

Figure 2. Design Principles for Learning Organizations

Designers of learning organizations will need to:

- Focus on the essential elements:
  - Increase the overall learning threshold; Assess & enhance current capacity
  - Create an ongoing adaptive capacity: Embed systemic linkages between needs, work, & rewards
  - Build autonomy & empowerment, "space of free movement"

This means that human resource developers will be called on to--

- Break the training frame
- Embed continuous learning strategies (learning groups, reading and study groups, learning labs with self learning materials available, on-line learning resources, desk top learning, etc.)
- Teach people how to learn from experience, to think systemically, to bend and to break frames
- Conceptualize and plan individual development as long term, multi-career, and as preparatory for multiple organizational futures
- Monitor and upgrade the overall knowledge/skill set of the whole organization
- Help people enact more participative, democratic workplaces and more autonomous environments
- Lead the organization's development toward a learning organization (and be able to measure its progress)
- Craft policies which make learning continuous, self-regulated, and autonomously funded

Conclusion

The idea of the learning organization brings together the fields of training, career development and organizational development into a single vision of the role of the human resource developer. It offers human resource developers the chance to invite the organization to embrace the deeper, more long term learning programs which we have always known were needed to effect any change in behavior that will create the organizational results desired. We think, in other words, that this idea has captured human resource developers because it may create the kind of leverage in the organization they have needed in order to be effective. Human resource developers have the opportunity to enter the board room, to help the organization see the way in which learning is intrinsic and essential to the achievement of organizational goals.

What then, finally, is a learning organization? A learning organization is one that has embedded a continuous learning process and has an enhanced capacity to change or transform. This means that learning is a continuous, strategically-used process — integrated with, and running parallel to, work — that yields changes in perceptions, thinking, behaviors, attitudes, values, beliefs, mental

models, systems, strategies, policies and procedures . Learning is sought by individuals and shared among employees at various levels, functions, or units. As a result, learning is embedded in an organization's memory of past wisdom, current repertoire of beliefs and actions, and future thinking processes.

Learning can either be incremental, that is, focused on refinements to current strategy, or transformational, that is focused on re-creating strategy because people understand the organization or its work in new, fundamentally different ways. Learning that is incremental allows the organization to be more resilient to changes or jolts while learning that is transformative leads to retention of new responses. The learning organization is an exciting concept for human resource developers because it has the potential to expand their role to include not only changing the threshold of skills in the organization, but also to become partners in the transformation of the entire organization.

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Human Resource Development: Performance Is The Key [1]

Richard A. Swanson
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This treatise argues that the HRD profession has been either been lax or indifferent as to its desired outcomes. Furthermore, it argues that HRD must focus on performance and performance improvement to qualify as a major business process and/or a value-added activity. Without a performance orientation, HRD is destined to the status of optional activity and/or a waste of resources.

The purpose of this position paper is to stimulate discussion by presenting a range of options for viewing human resource development (HRD). The major heading include (1) views of HRD, (2) definitions, (3) performance-- with or without instruction, (4) performance-- a closer look, and (5) conclusions.

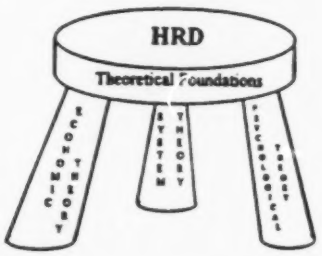
Views of Human Resource Development

First, I propose that scholars and professionals have the opportunity to view and position HRD at one of the following levels:

- *HRD as a major business process.....something an organization must do to succeed.*
- *HRD as a value-added activity.....something that is potentially worth doing.*
- *HRD as an optional activity.....something that is nice to do.*
- *HRD as a waste of business resources....something that has costs exceeding the benefits.*

Furthermore, I believe that the specific view selected by the HRD leader is the one that will most likely become reality-- a self-fulfilling prophecy. And, in the absence of a commitment from HRD leaders, management and/or government will mostly likely impose a view that is based on misinformation or partial information.

Second, I propose that the theoretical foundations of HRD are drawn from psychological theory, system theory, and economic theory (Swanson, 1992). The visual image I use is a three-legged stool having the ability to stand secure on both smooth and irregular surfaces (Figure 1). Furthermore, I believe that all three are required ingredients for HRD to be considered a major business process.



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[1] In press - *Human Resource Development Quarterly*, Vol. 6, No. 2, 1995. This paper is based on the author's conference keynote address to the International Research Network for Training and Development on June 23, 1994 in Milan, Italy.

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Definitions

Human Resource Development (HRD). Human resource development is a process of developing and/or unleashing human expertise through organization development and personnel training and development for the purpose of improving performance.

Components of HRD. The two major components of HRD are (1) personnel training and development and (2) organization development. In addition, HRD has three critical application areas including: human resource management, career development, and quality improvement.

Organization Development. Organization development is the process of systematically implementing organizational change for the purpose of improving performance.

Training and Development. Personnel training and development is the process of systematically developing expertise in individuals for the purpose of improving performance.

Performance. There are three levels of performance: organization, process, and individual.

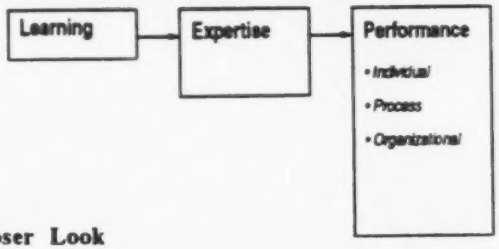
HRD Values: HRD practices should be theoretically and ethically sound. HRD calls upon theories from multiple disciplines. Thus, the problem of connecting sound theory and sound practice within a theoretically sound and ethical framework is an important part of HRD theory and practice.

Performance-- With or Without Instruction

The historic root of the HRD profession is with the training-learning component (Swanson and Torraco, 1995). In order to understand the contemporary role of HRD, it is important to revisit the role of learning in the profession.

I love learning. I love the process of learning and the results of having new knowledge. More than learning, I love expertise. I love the personal sense of self that results from being efficient and effective. Learning is only one component of expertise. More than expertise, I love performance. Expertise is only one component of performance (Figure 2). Worthy performance from the perspective of business and industry can be viewed at the organization, process, and individual levels (Rummler & Brache, 1988; Swanson, 1994).

Relationship Between Learning, Expertise, and Performance



Performance-- A Closer Look

For HRD to become a core business process, performance is the key. The performance perspectives of levels, variables, measures, and facets help clarify the concept of performance.

Performance Levels and Variables. The three levels of performance-- organization, process, and individual-- remind us that organizations view and value performance in a hierarchy (Rummler & Brache, 1988) and that there are multiple variables influencing performance. The following matrix of enabling questions in Figure 3 helps diagnose performance issues (Swanson, 1994, p. 52). When taken seriously, the seemingly simple matrixed questions lead the analyst to the core disconnects from performance.

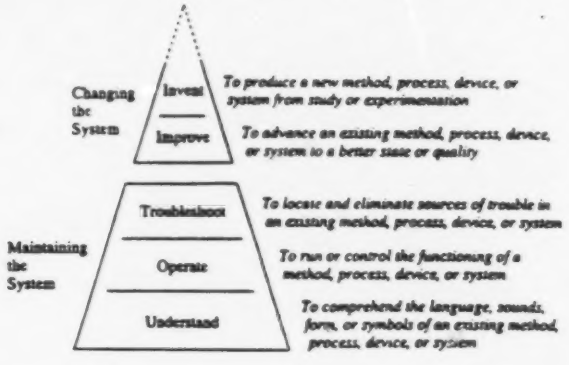
Performance Diagnosis Matrix of Enabling Questions

PERFORMANCE VARIABLES	PERFORMANCE LEVELS: Organizational Level	Process Level	Individual level
Mission/ Goal	Does the organizational mission/goal fit the reality of the economic, political, and cultural forces?	Do the process goals enable the organization to meet organizational and individual missions/goals?	Are the professional and personal missions/goals of individuals congruent with the organization's?
Systems Design	Does the organizational system provide structure and policies supporting the desired performance?	Are processes designed in such a way as to work as a system?	Does the individual face obstacles that impede job performance?
Capacity	Does the organization have the leadership, capital, and infrastructure to achieve its mission/goals?	Does the process have the capacity to perform (quantity, quality, and timeliness)?	Does the individual have the mental, physical, and emotional capacity to perform?
Motivation	Do the policies, culture, and reward systems support the desired performance?	Does the process provide the information and human factors required to maintain it?	Does the individual want to perform no matter what?
Expertise	Does the organization establish and maintain selection and training policies and resources?	Does the process of developing expertise meet the changing demands of changing processes?	Does the individual have the knowledge, skills, and experience to perform?

Measures of Performance. If HRD is aimed at specific performance requirements, and is an appropriate intervention, units of worthy performance will be identifiable. Critical measures of performance in business and industry are tied to the core goods and services of the organization and are generally measured in terms of (1) quantity, (2) time, and/or (3) quality features that can be easily converted into monetary worth (Hronec, 1993; Swanson & Gradous, 1988; Swanson, 1990). Core goods and services might include such things as microchips produced, computers assembled, windshields made, wiring harnesses produced, subscriptions, meals served, or clients. HRD viewed as an optional activity (something nice to do) or even a value added activity (something that is potentially worth doing) is almost never directly connected to core business outputs. Thus, attempting to evaluate workplace performance outcomes from these programs is generally futile.

Taxonomy of Performance. Performance requirements in today's workplace can often be separated into two levels. One level has is concerned about maintaining the existing system. The second level has to to with improving the system. Organizations experience a concurrent need for control and innovation and the "Taxonomy of Performance" (Swanson, 1994, p. 57) provides additional insight into performance requirements at these disparate levels and the role HRD can play in improving performance (Figure 4).

Taxonomy of Performance.


Changing the System
Invent
To produce a new method, process, device, or system from study or experimentation
Improve
To advance an existing method, process, device, or system to a better state or quality
Maintaining the System
Troubleshoot
To locate and eliminate sources of trouble in an existing method, process, device, or system
Operate
To run or control the functioning of a method, process, device, or system
Understand
To comprehend the language, sounds, form, or symbols of an existing method, process, device, or system

HRD As A Major Business Process. The standard system model (input->process->output) helps illustrate the business organization as a system and HRD as a subsystem. Most organization charts with their hierarchies show the chain of command of the organization, not a mission and goal-driven system.

• *HRD as a major business process.....something an organization must do.*
The standard system model (input->process->output) model has external customer requirements on the input side and external customer satisfaction as the output. As a major business process, HRD's contribution is directly connected to the external customer and most likely serves internal customers and parallel processes to achieve core performance outputs of the organization.

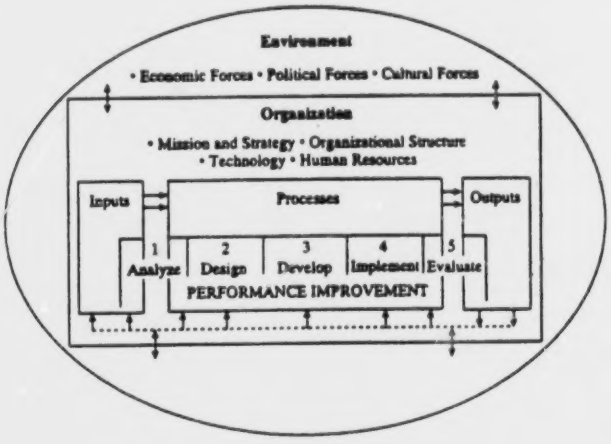
• *HRD as a value added activity.....something that is potentially worth doing.*
• *HRD as an optional activity.....something that is nice to do.*
HRD that connects to the internal customer (not to the external customer) is not systemically positioned to be a major business process. Under this condition-- as a supporting sub-system-- HRD has the potential of being aligned with the strategic goals and thus, adding value to the organization. Without this alignment, however, HRD is viewed as an optional activity that is totally dependent on the integrity of the internal customer it serves.

• *HRD as a waste of business resources....something that has costs exceeding the benefits.*
Finally, and tragically, HRD commissioned by an internal customer without systemic, psychological, and/or economic integrity can cause losses to an organization. While I know of no research as to the extent of losses caused by HRD, I believe that the negative impact of low quality HRD efforts are large.

Conclusion

In conclusion, I offer the following general model of HRD as a major performance improvement business process partner-- one that connects HRD to other major business processes that are influenced by and influence the total organization and the environment in which it functions (Swanson, 1994, p. 20). Furthermore, the model displays an orderly process in which HRD acknowledges performance as the key in the struggle to retain the integrity of the individual, process, and organization.

Systems Model of Performance Improvement.



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